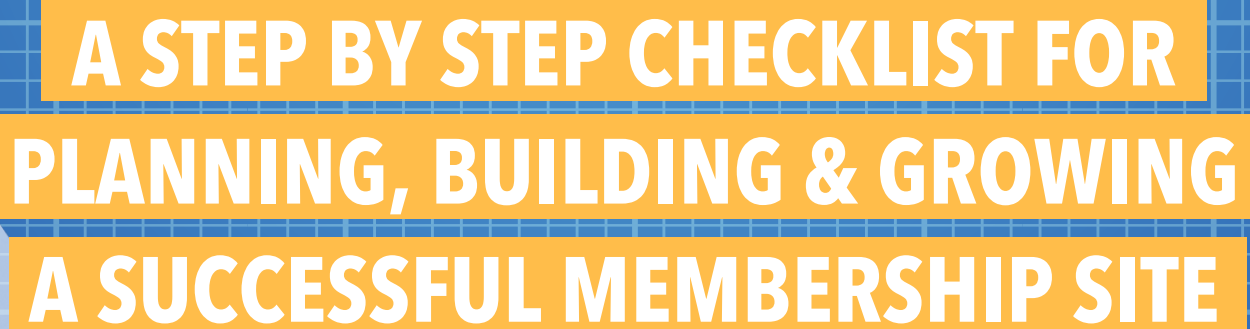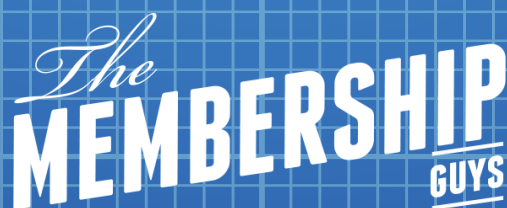# MEMBERSHIP
BLUEPRINT

A STEP BY STEP CHECKLIST FOR PLANNING, BUILDING & GROWING A SUCCESSFUL MEMBERSHIP SITE

The MEMBERSHIP GUYS

Planning Your Membership

The Membership Guys

The aim of this stage is to have a clear plan for your membership – from your idea to your content - that you can move forward with into the creating stage and beyond.

1. Set Your Expectations

- ◯ Get clear on why you want to create a membership site
- ◯ Audit your existing audience and resources – what are you starting with?
- ◯ Decide on your goals for the first 3 months, 6 months and 12 months
- ◯ Decide if a membership is definitely the right choice for you

2. Choose Your Idea

- ◯ Brainstorm initial ideas
- ◯ Research your idea options
- ◯ Select your final idea
- ◯ Validate your idea with an MVP

3. Decide on Your Offering

- ◯ Choose your membership model

- ◯ Decide on the features and functionality that you need

- ◯ Decide what your content will be

- ◯ Outline your content

- ◯ Decide how content will be delivered

- ◯ Choose a community type

- ◯ Start considering initial member engagement methods

4. Select Your Pricing

- ◯ Determine your pricing structure (eg. monthly, quarterly, annual, one-off)

- ◯ Decide on your main ongoing price point

- ◯ Consider a special launch discount or offer

- ◯ Decide if you want to try free or paid trials in the future

5. Decide Your Branding & Positioning

○ Decide how you want to position your membership in the marketplace

○ Choose a name for your membership site

○ Choose your membership branding including colours, fonts, logo

○ Create your elevator pitch

○ Develop your membership one-sheet

Congratulations, you've now completed the planning stage!

🎙 Related Podcast Episodes

- [How to choose & research your membership ideas](#)
- [4 tips for validating your membership idea](#)
- [How to handle someone having the same idea for their membership](#)
- [How to validate your idea for a membership site with Pat Flynn](#)
- [5 reasons why I dislike the closed door membership strategy](#)
- [Busting the 8 most common myths about membership sites](#)
- [Why your membership website needs more than just content](#)

Related Blog Posts

- [4 ways to discover what your audience really wants](#)

- [How much does it cost to start and run a membership site](#)

- [Choosing a payment option for your membership site](#)

- [How much time does it take to run a membership site](#)

- [How to figure out what to charge for your membership site](#)

- [Which membership model should you use](#)

- [7 different membership models](#)

- [12 different types of membership content](#)

- [7 principles of successful membership sites](#)

- [Should your membership site be evergreen or time sensitive](#)

Related Member Content

- [How to create your membership masterplan course](#)

- [Membership mindset training](#)

- [Creating Your Membership Content Strategy course](#)

- [Guide to creating compelling courses](#)

- [Building an audience for your membership site course](#)

- [One to many: a guide to membership site success](#)

- [Your membership site and the law training](#)

Creating Your Membership

The aim of this stage is to put your plan into action and create a membership site that functions well and is ready to be launched into the world.

6. Build Your Audience

○ Decide on your ideal launch date

○ Create a wait list page for your upcoming membership site

○ Start directing traffic to your wait list page

○ Regularly email your list with useful information and behind scenes details

7. Choose Your Tech Tools

○ Buy your domain name

○ Decide whether to use WordPress or a different platform

○ Decide whether to DIY or outsource site development

○ Pick your content tools e.g. PowerPoint, Screenflow, Vimeo

- ○ Choose your payment processor(s) e.g. PayPal, Stripe, Authorize.net

- ○ Choose your membership plugin/platform e.g MemberPress, MemberMouse

- ○ Choose your course (LMS) plugin (if required) e.g. LearnDash, LifterLMS

- ○ Decide on any additional plugins or software needed, e.g. affiliate program, gamification options, form options, shopping cart

- ○ Pick a community option e.g. IPBoard, bbPress, Facebook, Mighty Networks

- ○ Choose additional marketing tools as needed, e.g. email marketing service, landing page builder

- ○ Decide on your site structure and essential pages

- ○ Create a sitemap

8. Create Your Membership Site (WordPress)

- ○ Set up hosting

- ○ Install and set up WordPress

- ○ Choose a WordPress theme for your site design

- ○ Install and customise your theme

- ○ Set up your membership and/or course plugin

- ◯ Create your membership pages

- ◯ Set up your membership community

- ◯ Add any additional features needed

- ◯ Install essential plugins – Backup, Security

- ◯ Create your sales page

- ◯ Link payment and registration to sales page buttons

9. Create Your Content

- ◯ Decide on your initial launch content

- ◯ Create a content development plan

- ◯ Start to create your content

- ◯ Add completed content to membership site (remember to protect)

- ◯ Create a plan for ongoing content creation

10. Set Up Your Onboarding

○ Decide on the first 3-5 actions you want your members to take

○ Decide what members need to know to make best use of the site

○ Create an onboarding plan based on the above two points

○ Create a new member tour or getting started video

○ Create an onboarding email sequence

○ Set up any additional onboarding elements needed

11. Test Your Setup

○ Test your site build e.g. is it mobile friendly, fast enough, user friendly

○ Test your sales process e.g. go through the entire sign up process & payment

○ Test your member process e.g. can you access the right pages, is everything clear, can you access the community

○ Check you receive any membership and onboarding emails

○ Ask a friend to also test all the above and provide feedback

Congratulations, you've now completed the creation stage!

Related Podcast Episodes

- How to avoid paralysis by analysis when creating your membership

- How to find and hire a website developer

- How to choose a membership plugin

- How to get good advice on the best membership plugin

- How to create amazing educational content with Colin Gray

- 6 ways to use onboarding to give members a warm welcome

Related Blog Posts

- 7 things to consider when choosing a membership theme

- What to consider when deciding where to house your membership

- 10 features to consider when choosing your membership plugin

- How to build a membership site in under a day

- Should you use a membership plugin or LMS plugin

- What if I don't want to use WordPress for my membership site

- 8 questions to ask before purchasing a membership plugin

- Tools for creating your membership sales funnel

- 5 options for adding a forum to your membership site

- Creating your membership content

- Why you need a kickass member onboarding process

- 5 things to include in your member onboarding sequence

🔒 Related Member Content

- [Building an audience for your membership site course](#)

- [Creating a rock solid membership platform course](#)

- [Creating your membership pages course](#)

- [Creating a kickass member onboarding strategy course](#)

- [Membership content strategy course](#)

- [Creating stunning graphics for your membership site course](#)

- [Managing your content production training](#)

- Tech walkthroughs including:

    - MemberPress
    - MemberMouse
    - Paid Memberships Pro
    - Wishlist Member
    - Restrict Content Pro
    - AccessAlly
    - OptimizeMember
    - WooCommerce Memberships & Subsriptions
    - Simplero
    - IPBoard
    - bbPress & BuddyPress
    - Gravity Forms
    - Memberoni theme
    - GeneratePress
    - OptimizePress
    - ThriveArchitect
    - Beaver Builder

Launching Your Membership

The Membership Guys

The aim of this stage is to plan and execute a successful launch of your membership site, including settling in your new members and your first steps as a membership site owner.

12. Pre-Launch

○ Ramp up building wait list

○ Consider a beta test for further testing and initial founder members

○ Decide on a pre-launch strategy e.g. challenges, content, webinars

○ Start building buzz and anticipation e.g. sneak peeks, Facebook Ads

13. Launch

○ Choose your launch tactics e.g. webinars, PLF, summit, live video, affiliates

○ Finalise launch details e.g. launch price, date, emails

○ Set your launch goals

○ Run final pre-launch checks

○ Consider hiring launch support – customer service, tech support, FB Ads

○ Open the doors and start promoting the membership

○ Welcome new members and encourage community use

14. Post Launch

○ Assess your launch results

○ Start tracking churn and growth e.g. spreadsheet, plugin stats, SaaS software

○ Keep up marketing momentum if doors remaining open

○ Communicate regularly with members

○ Create a routine for dealing with your community

○ Create a plan for developing ongoing content

○ Get feedback from members on initial experience

○ Get feedback from non-members on why didn't buy

○ Plan date for next launch (launch model) or promotion (evergreen model)

Congratulations, you've now completed the launching stage!

🎙 Related Podcast Episodes

- [Keys to a successful membership launch](#)
- [5 reasons why I dislike the closed door membership strategy](#)
- [How much content do you need to launch a membership](#)
- [Using an online summit to launch a membership with Yann Ilunga](#)

📝 Related Blog Posts

- [Why should run a beta test for your membership site](#)
- [6 ways to create interest and buzz for your membership launch](#)
- [Tales from the launch of our own membership site](#)
- [12 proven tactics for starting a new membership community](#)

🔒 Related Member Content

- [Launching your membership site course](#)
- [Video Launch Formula with Emmy Wu](#)
- [Launching, funnels and summits training with Yann Ilunga](#)
- [Behind the scenes of the Member Site Academy launch](#)

Growing Your Membership

The aim of the growth stage is for you to be able to grow and manage your membership site on an ongoing basis. This stage of your membership site is continual.

15. Attract New Members

- ◯ Decide on core traffic strategies e.g. content, video, podcasting, FB group
- ◯ Look at analytics and stats for areas of improvement
- ◯ Create a marketing & promotional calendar for the year
- ◯ Consider testing a free or low cost trial
- ◯ Consider retargeting ads for those opting in or visiting sales page
- ◯ Consider sales boosting tactics such as affiliates, bonuses, targeted promotions
- ◯ Put an abandoned checkout sequence in place to salvage lost sales

16. Retain Existing Members

- ◯ Check whether your onboarding sequence is effective – tweak if needed
- ◯ Survey existing members for areas of improvement

○ Look at ways of increasing member engagement – forum topics, gamification, regular member emails, live calls

○ Have a clear and easy cancellation process in place

○ Find out why your members leave and address any areas possible

○ Set up a win back sequence for cancelled members

○ Show up, deliver what was promised and build relationship with members!

17. Managing Your Membership

○ Regularly check in with your community and encourage engagement

○ Develop a routine for content creation e.g. batching

○ Have a process in place for content delivery e.g. monthly release process

○ Set up a process for any live content e.g. member Q&As, webinars

○ Know your numbers – keep track of signups, churn, lifetime value

○ Send a regular weekly email or video with latest content community posts

○ Have a process in place for failed payments

○ Have a process in place for sending annual renewal reminders

18. Scaling & Growth

- ○ Look at ways to scale your content production e.g. hiring an editor, batching
- ○ Look at ways to improve content use on site e.g. filtering, search, saving
- ○ Start scaling your marketing with Facebook or other Ads
- ○ Look at additional sales tactics such as intro offers (tripwires), splinter courses
- ○ Consider a member only affiliate program
- ○ Assess and tweak your email sequences and existing funnels
- ○ Consider increasing your pricing once membership grown
- ○ Assess and tweak your email sequences and existing funnels
- ○ Consider increasing your pricing once membership grown
- ○ Grow your team as needed e.g. VA, community manager, tech support
- ○ Adapt anything that isn't currently working
- ○ Regularly assess health of membership including growth rate
- ○ Consider expanding your offering with higher tiers or additional products

Congratulations, you're now a successful membership site owner!

- How to stay motivated as a membership site owner

- How to streamline production of your membership content

- How to market your membership by building authority

- Marketing tactics for attracting new members

- Advanced tips and tactics for offering a membership trial

- How to deal with problem members in your community

- How to identify your member drop-off points

- How to use gamification to improve member engagement

- Why you're losing members and what you can do about it

- Using Facebook groups to grow your membership with Jill Stanton

- Using webinars to grow your membership with Amy Porterfield

- Using live video to market your membership site with Luria Petrucci

- How to attract new members by running a free challenge

- 4 tactics for accelerating the growth of your membership audience

- How to improve member engagement

- How to win back your lapsed and cancelled members

- Why membership site owners need to embrace change

- 6 things membership site owners should stop worrying about

- Why it's important to take time away from your membership site

- Dealing with the ugly side of running a membership site

- How to add multiple revenue streams to an existing membership site

📝 Related Blog Posts

- KPI's every membership site owner should be tracking

- 6 ways membership site owners should be using remarketing

- Using offers and promotions to attract new members

- How to attract new members without feeling like a sleazy marketer

- 4 Ways to ensure your members stick around

- 21 quick tips for improving member retention

- 4 must have email automations for your membership site

- How to handle customer service for your membership site

- 5 things to consider when adding gamification to your membership

- 5 ways to use forms to improve the member experience

- How to easily increase engagement with member roundups

- What to do and what to avoid when someone cancels their membership

- Why every membership site owner needs to focus on improving content

- Promoting your membership site with an affiliate program

- The 5 key stages of the membership lifecycle

- 6 areas to focus on when scaling your membership business

- 7 biggest mistakes that growing membership site owners make

- Taking your membership site offline for increased success

- [Complete Guide to Managing Your Membership Site](#)
- [Managing your membership community course](#)
- [Attracting new members course](#)
- [Member onboarding and engagement course](#)
- [Member retention and reactivation course](#)
- [Gamification for membership sites course](#)
- [Marketing automation with ActiveCampaign course](#)
- [Attract more members with content marketing course](#)
- [Attract more members with podcasting course](#)
- [Creating an affiliate program for your membership site course](#)
- [Strategies for powering up your sales funnel course](#)
- [Live video for membership sites training with Luria Petrucci](#)
- [Media coverage for membership sites training with Janet Murray](#)
- [Advanced membership pricing tactics](#)
- [Outsourcing to virtual assistants training with Chris Ducker](#)
- [Scaling up your membership content training](#)

Want access to our full Membership Roadmap, all it's related resources and the number one training community for membership site owners?

Click here to find out more